

WORLD QUALITY REPORT

2011/12

FRANCE

This is an extract from the *World Quality Report 2011-2012* which presents findings from a global survey completed online by over 1,200 CEOs, CFOs, CIOs, IT directors and managers, and quality assurance (QA) directors and managers around the globe. The goal of this report is to examine the state of application quality and testing practices across different industries and geographies.

The full report can be accessed at www.capgemini.com/testing or www.sogeti.com/testing.



Thanks to European and French regulations, the French economy has proven to be more resilient than many others during the recent economic crisis. The French industry sector which is more exposed to the international context remained stable, while the Public Sector, in alignment with the European stability pact, needed to reduce investments and find new budgets to provide for pensions and social security cover – two major French reforms of 2010. However, 2010 was a year of recovery for IT, with investments reverting to a growth trajectory in the main industry sectors: Banking and Insurance, Telcos, Retail, and Services.

According to La Fédération SYNTEC¹ - a group that represents close to 80% of IT professionals in France - IT budgets will grow in 2011 from 3% to 8% of organizations' revenue, and the priorities of CIOs will be focused on new projects including infrastructure transformation using cloud, mobile solutions integration, service centers, and security. Many organizations are striving to achieve agile IT and to leverage it for new business opportunities.

Top Trends

- ↗ *Testing activities growing faster than development and application management*
- ↗ *Outsourcing growing but mainly to nearshore or French-speaking countries*

In this context, the survey shows that testing activities are growing faster than development and application management (11% growth versus 9%) and demand is changing significantly from staff augmentation to more professionalized and externalized managed services. As a consequence, consulting demand is very strong for test process assessment, change management, and transformation governance. The CAC40 companies (the index for the 40 main companies in the French Stock Exchange) have dedicated testing teams or use third-party providers with dedicated resources. The consequences of the typical French organization split between the “think” part (AMOA in French) and the “solution” part (AMOE in French) is that the design, build, and run stages of an application achieve a better quality due to the independence of the two parts, but require a larger testing effort due to redundancies.

¹ La Fédération SYNTEC represents close to 1,250 groups and French companies specializing in engineering, IT services, consulting, and professional training.

By *François Darphin*, Global Testing Services, France, Sogeti

90% OF THE SURVEY RESPONDENTS INDICATE THAT THEY USE CONTRACTORS OR THIRD-PARTY PROVIDERS FOR A PORTION OF THEIR QA ACTIVITIES

The data from French company respondents in this year's *World Quality Report* indicates that French organizations now recognize that they have to invest more in testing to optimize the overall efficiency of testing activities. Today, QA tasks are carried out primarily manually and by non-specialists. However, this tendency will likely change in the near future, with companies of all sizes increasing their QA budgets. Using a standardized and industrialized Testing Center is now the new rule. TCOEs are becoming more common, as well as sharing multi-user licenses. This helps explain why France uses fewer perpetual licenses (11%) than other parts of the world, such as the US (40%).

In order to reduce costs, French companies are accessing offshore resources from their own subsidiaries or from European-based partners. Over 90% of the survey respondents from France indicate that they use contractors or third-party providers for a portion of their QA activities. French regulations dictate that the French language must be used for French users, and European data protection rules only permit private data exchanges within Europe or countries with the same level of control. This limits offshoring possibilities to India, and therefore French companies prefer nearshoring to Poland and Morocco, or further afield to Mauritius or Vietnam. Teams in general, including testing teams, are more and more geographically distributed, and the demand for collaborative tools is strong.

Test data and test environment management are common concerns of all organizations, with or without a TCOE. This creates a strong demand for tools to secure software content, packaging, and deployment. Cloud testing is in its early stages in this respect, but viewed as a good solution with demand for SaaS for tools (only 11% of French companies indicate they do not purchase tools through SaaS solutions compared to 29% for the rest of the world) and dynamic test environments or test lab provisioning. The preferred choice is a private cloud to comply with French regulations for data hosting and security.

Moving Forward...

- **New Comprehensive Testing Model:** Now that many French companies have created their own Test Centers and have used specialist providers for staff augmentation, they are looking for committed partners to achieve higher quality standards and cost reduction. This will stimulate further growth in demand for managed testing services, based on quality SLAs, fixed units of work, service centers, and externalization of test execution. This will change the traditional supplier offer of a “third-party acceptance test” model to a more comprehensive package consisting of methodologies, services, tools, and end-to-end services.
- **A different way of consuming testing services:** Customers are now asking for recurring activities, together with active knowledge capitalization, on-demand services, and licenses with a “pay per use” model.
- **Quality improvement – a new driver for governance:** Many French companies are changing their mindsets, processes, and tools to attain the required quality levels. Stakeholders, organizational business units, and providers all need to work more collaboratively rather than devolving responsibility. The concept of “Quality of Service” is now driving testing activities as the best means of optimizing the balance between the often conflicting priorities of time-to-market, quality, and cost.
- **Re-using versus re-doing:** All companies are looking to leverage existing testing assets and increase automation. The objective is to accelerate the overall test process, including the test design phase.

Contacts

We value your comments and ideas. We welcome you to contact us in relation to any questions you might have concerning the 2011-2012 *World Quality Report*.

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About Capgemini and Sogeti

With around 115,000 people in 40 countries, The Capgemini Group is one of the world's foremost providers of consulting, technology and outsourcing services. The Group reported 2010 global revenues of EUR 8.7 billion. Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive the results they want. A deeply multicultural organization, Capgemini has developed its own way of working, the Collaborative Business Experience™, and draws on Rightshore®, its world-wide delivery model. Sogeti, its wholly-owned subsidiary, is a leading provider of local professional services, bringing together more than 20,000 professionals in 15 countries and is present in over 100 locations in Europe, the US and India.

Together, Capgemini and Sogeti have developed innovative, business-driven quality assurance (QA) and testing services, combining best-in-breed testing methodologies (TMap® and TPI®) and the global delivery model, Rightshore®, to help organizations achieve their testing and QA goals. Capgemini and Sogeti have created one of the largest dedicated testing practices in the world, with over 8,200 test professionals and a further 12,500 application specialists, notably through a common center of excellence with testing specialists developed in India.

More information is available at:
www.capgemini.com/testing
www.sogeti.com/testing

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